Residence Homestead Exemption Application

Dallas Central Appraisal District: PO Box 560328 Dallas, TX 75356-0328 214-631-0910
Appraisal District's Name

00000166501000000
Appraisal District Account Number (if known)

Are you filing a late application? ☐ Yes ☐ No Tax Year(s) for Application

GENERAL INFORMATION: Property owners applying for a residence homestead exemption file this form and supporting documentation with the appraisal district in each county in which the property is located (Tax Code sections 11.13, 11.131, 11.132, 11.133, 11.134 and 11.432). **Do not file this form with the Texas Comptroller of Public Accounts.** Attach a copy of your Texas driver's license/ID card. The address listed on the license/ID must match the address of the property.

SECTION 1: Exemption(s) Requested (Select all that apply.)

Do you live in the property for which you are seeking this residence homestead exemption? ☐ Yes ☐ No

☐ **General Residence Homestead Exemption** ☐ **Disabled Person (attach proof)** ☐ **Age 65 or Older (or Surviving Spouse)**

☐ **100 Percent Disabled Veteran (or Surviving Spouse)** Is the disability a permanent total disability as determined by the U.S. Department of Veterans Affairs under 38 C.F.R. Section 4.15? ☐ Yes ☐ No

☐ **Surviving Spouse of an Armed Services Member Killed or Fatally Injured in the Line of Duty**

☐ **Surviving Spouse of a First Responder Killed in the Line of Duty**

☐ **Donated Residence of Partially Disabled Veteran (or Surviving Spouse)**

Percent Disability Rating

Surviving Spouse:

Name of Deceased Spouse

Date of Death

Cooperative Housing: Do you have an exclusive right to occupy this property because you own stock in a cooperative housing corporation? ☐ Yes ☐ No

If yes, state name of cooperative housing corporation:

Were you receiving a residence homestead exemption on your previous residence? (If yes, See Section 5) ☐ Yes ☐ No

Are you transferring an exemption from a previous residence? ☐ Yes ☐ No

Are you transferring a tax ceiling? (If yes, you may print the form from www.dallascad.org) ☐ Yes ☐ No

Previous Residence Address, City, State, Zip Code

Previous County

SECTION 2: Property Owner/Applicant (Provide information for additional property owners in Section 5.)

Select One: ☐ Single Adult ☐ Married Couple ☐ Married-living separately ☐ Trust (attach copy of document creating trust)

Name of Property Owner 1

Birth Date* (mm/dd/yyyy)

Driver's License, Texas ID Card**

Primary Phone Number (area code and number)

Email Address***

Percent Ownership Interest

Name of Property Owner 2
(e.g., Spouse, Co-Owner/Individual)

Birth Date* (mm/dd/yyyy)

Driver's License, Texas ID Card**

Primary Phone Number (area code and number)

Email Address***

Percent Ownership Interest

Applicant Mailing Address (if different from the physical address, please explain why)

SECTION 3: Property Information

Date you acquired this property

Date you began occupying this property as your principal residence

Physical Address (i.e. street address, not P.O. Box), City, ZIP Code

Legal Description (if known)

Is the applicant identified on deed or other recorded instrument?

☐ Yes

☐ No

Court record/filing number on recorded deed or other recorded instrument, if available If no, required documentation must be provided. (see Explanation of Exemptions)

SECTION 3: Property Information (continued)

Is the property for which this application is submitted an heir property? (see Explanation of Exemptions) ☐ Yes ☐ No

Do other heir property owners occupy the property? ☐ Yes (affidavits required) ☐ No

Manufactured Home Make _____ Model _____ ID Number _____

Number of acres (or fraction of an acre, not to exceed 20 acres) you own and occupy as your principal residence: _____ acres

SECTION 4: Waiver of Required Documentation

Indicate if you are exempt from the requirement to provide a copy of your driver's license or state-issued personal identification card.

☐ I am a resident of a facility that provides services related to health, infirmity or aging. Attach a letter from the facility including the name and address of the facility, the applicant's date of residency, and confirmation of services received relating to health, infirmity, or aging.

☐ I am certified for participation in the address confidentiality program administered by the Office of the Texas Attorney General under Code of Criminal Procedure Chapter 58, Subchapter B. Attach proof of participation.

Indicate if you request that the chief appraiser waive the requirement that the property address for exemption corresponds to your driver's license or state-issued personal identification card address:

☐ I am an active duty U.S. armed services member or the spouse of an active duty member.

☐ I hold a driver's license issued under Transportation Code Section 521.121(c) or 521.1211. Attached is a copy of the application for that license.

SECTION 5: Provide Additional Information Here

Was any portion of your property used for rental purposes or not occupied for homestead purposes (such as a room over a garage, detached buildings, or servant's quarters)? ☐ Yes ☐ No If yes, state the square footage used for rental _____

If you claim an exemption on another property or on your previous residence, if the property is located within Dallas County, the exemption will be removed and applied to this property. If the previous residence is located outside Dallas County, please attach documentation from the other appraisal district verifying removal of the exemption.

SECTION 6: Affirmation and Signature

I understand if I make a false statement on this form, I could be found guilty of a Class A misdemeanor or a state jail felony under Penal Code Section 37.10.

I, _____ (Property Owner/Authorized Representative Name), _____ (Title/Authorization), swear or affirm the following:

1. that each fact contained in this application is true and correct;

2. that I/the property owner meet(s) the qualifications under Texas law for the residence homestead exemption for which I am applying; and

3. that I/the property owner do(es) not claim an exemption on another residence homestead or claim a residence homestead exemption on a residence homestead outside Texas.

sign here ➧ _____ (Signature of Property Owner/Applicant Representative) _____ (Date)

sign here ➧ _____ (Signature of Additional Property Owner/Applicant (if any)) _____ (Date)

* May be used by appraisal district to determine eligibility for persons age 65 or older exemption or surviving spouse exemptions Tax Code §11.43(m).

** A driver's license number or Texas identification number disclosed in an exemption application is confidential and not open to public inspection, except as authorized by Tax Code §11.48(b).

*** May be confidential under Government Code §552.137; however, by including the email address on this form, you are affirmatively consenting to its release under the Public Information Act.

EXPLANATION OF EXEMPTIONS

Por Favor volte para explicación en español o hable al 214-631-0910

General Residence Homestead Exemption: To qualify for this exemption, you must own and reside in your home on the date you request the exemption. You may receive only one homestead exemption in a tax year. Applications cannot be filed *before* the date you qualify for the exemption. You may **apply online** at www.dallascad.org.

Age 65 or Older: To qualify for an Age 65 or Older exemption, you must be at least age 65. This exemption includes a school tax limitation or ceiling. You may receive the Age 65 or Older exemption immediately upon qualification of the exemption.

Disabled Person Exemption: You may receive the Disabled Person exemption immediately upon qualification of the exemption. To qualify, you must meet the Social Security definition for disability under the Federal-Old Age, Survivors and Disability Insurance Program administered by the Social Security Administration. Disability benefits from any other program do not automatically qualify you. To verify your eligibility, you must provide a current dated statement from the Social Security Administration showing that **you are disabled** and the **date** your **disability began.**

Tax Limitations: The Age 65 or Older or Disabled Person exemption for school taxes includes a school tax limitation or ceiling. Other types of taxing units (county, city, or special district) have the option to grant a tax limitation on homesteads of homeowners disabled or 65 years of age or older. You may transfer the same percentage of school taxes paid to another qualified homestead in the state. If the county, city or special district grants the limitation, you may transfer the same percentage of taxes paid to another qualified homestead within that same taxing unit. You **may not receive both** the Age 65 or Older and Disabled Person exemption from the same taxing unit in the same tax year, Tax Code 11.13(h). However, you may receive both exemptions from different taxing units.

Age 55 or Older Surviving Spouse of individual who qualified for Age 65 or Older Exemption or Disabled Person Exemption: You qualify for an extension of the exemption if you were 55 years of age or older on the date your spouse died and your deceased spouse was receiving the Age 65 or Older exemption on **this** residence homestead or would have qualified for the exemption in the year of the spouse's death. You are entitled to the tax limitation if you were 55 years of age or older when your spouse, who was receiving the Disabled Person exemption, died and the residence homestead was the residence homestead of the surviving spouse on the date the individual died and remains the residence homestead of the surviving spouse.

100% Disabled Veteran or Surviving Spouse of Disabled Veteran who qualified or would have qualified for the 100% Disabled Veteran's Exemption: You may qualify for this exemption if you are a disabled veteran who receives from the United States Department of Veterans Affairs or its successor: 1) 100% disability compensation due to service-connected disability; and 2) a rating of 100% disabled or individual unemployability; or if you are a **surviving spouse** of a disabled veteran who qualified or would have qualified for the 100% Disabled Veteran exemption at the time of death and 1) you have not remarried since the death of the disabled veteran and 2) the property was your residence homestead when the disabled veteran died and remains your residence homestead. You may receive the exemption for the applicable portion of that tax year immediately on qualification for the exemption. Tax Code §11.131. Applicants must provide a current copy of their V.A. award letter.

Required Documents: Attach a copy of your TX driver's license or TX ID card. You may be exempt from the driver's license/ID requirement if you reside in a facility that provides services for health, infirmity, or aging; or a certified participant of the ACP for victims of family violence, sexual assault, or stalking (proof required). The address listed on your driver's license/ID card must **match** your homestead property address. This address requirement may be waived if you hold a driver's license under Transportation Code §521.121(c) or §521.1211 (proof required). For **manufactured homes,** you must *also* include a copy of the statement of ownership and location issued by the TX Department of Housing and Community Affairs and a copy of the purchase contract or payment receipt showing you are the owner. If after making a good faith effort, you are unable to establish ownership as stated above, complete the sworn affidavit included with the application.

Mailing Address: You may choose a different mailing address from the property address (explanation required); however, the address on your driver's license or ID card must **match** the homestead property address.

Ownership Status: *Each* individual owner, excluding married couples, residing on the property must complete a ***separate*** application to qualify for an exemption for his or her interest in the property. For property owned through a beneficial interest in a qualifying trust, **attach a copy of the document** creating the trust. **For Heir property**, attach Affidavit for Heir Property (located with application affidavits), copy of Death Certificate, recent utility bill, and Court citation, if available.

Signature Required: Your signature on the application constitutes a sworn statement that you have read and understand the *Penalty for a False Statement*, you are qualified for the exemption(s) checked, the facts in the application are true and correct, and that you do not claim a residence homestead exemption on another residence homestead in Texas or in another state.

Penalty for False Statement: If you make a false statement on the application, you could be found guilty of a Class A misdemeanor or a state jail felony under Penal Code §37.10. The Tax Code imposes a penalty of 50 percent for delinquent taxes if a property received an erroneously granted homestead exemption.

Application Deadlines/Late File: For the homestead exemption, you must file the completed application with all required documentation between January 1 and April 30 of the tax year for which you are claiming the exemption. You may file a late application for a residence homestead exemption, no later than two years after the tax delinquency date, Tax Code §11.431; five years after the delinquency date for Disabled Veteran Exemption and a 100% disabled veteran homestead exemption, §11.439.

Additional Information Request: After considering the application and all relevant information, the chief appraiser may request additional information. You must provide the additional information within 30 days of the request or the application is denied. For good cause shown, the chief appraiser may extend the deadline for furnishing the additional information by written order for a single period not to exceed 15 days, Tax Code §11.45.

When New Application Required: If the chief appraiser grants your exemption(s), you do not need to reapply annually. A 65 or Older exemption will be automatically applied according to the Date of Birth/s provided on the Homestead application. However, by written notice accompanied by the appropriate application, you may be required to file a new application to confirm your current qualifications for the exemption(s). If you want the exemption(s) to apply to property not listed on this application, you must file a new application, Tax Code §11.43 (c).

Duty to Notify: You have a duty to **notify** the chief appraiser in writing when your entitlement to any **exemption ends.**